

John Bergner

Shareholder

Practices: Wealth Preservation

Industries: Investment Management & Private Funds

John Bergner is a shareholder in the Dallas, Texas office of Winstead PC. Mr. Bergner has been with Winstead for more than 38 years. Mr. Bergner is a specialist in estate planning and probate law certified by the Texas Board of Legal Specialization. His practice involves complex tax, estate and business succession planning as well as administration of estates. He earned a B.B.A. and J.D. from Washburn University, and an M.L.T. from Georgetown University Law Center.

Mr. Bergner is active in the American Bar Association, having served as a Council Director, and past chair of the Estate and Gift Tax Committee and the Continuing Legal Education Committee of the ABA's Tax Section. He is a Fellow of the American College of Trust and Estate Counsel, currently serving as a member of the Estate and Gift Tax committee. He currently serves as vice-chair of the Estate and Gift Tax Committee of the American Bar Association's Real Property Trusts and Estates Law Section and is a member of the Continuing Education Committee. He has lectured at numerous tax and estate planning seminars and is a visiting adjunct professor at the University of Miami Law School.

Representative Experience

- Provides estate planning and administration of estates and trusts, including charitable and post-mortem tax planning and rendering advice regarding fiduciary responsibilities
- Represents and counsels individuals and entities regarding asset preservation and creditors in connection with claims against estates and trusts
- Organizes and qualifies private foundations and other nonprofit organizations
- Implements sophisticated estate planning techniques, including business succession plans, grantor retained annuity trusts and installment sale of limited partnership interests to grantor trusts
- Provides counsel to corporate trustees and trust departments

Professional & Community Service

- American College of Trust and Estate Counsel (Fellow)
- American Bar Association Estate and Gift Taxes Committee (Member and Chairman, 2006-2008)
- University of Miami School of Law (Adjunct Professor)
- Communities Foundation of Texas (Advisory Council)
- Parkland Planned Giving Council
- Southwestern Medical Foundation and UT Southwestern (Estate Planning Council)

Awards & Recognition



Dallas Office

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Education

Georgetown University Law Center

– M.L.T., 1985

– Editorial Board, *The Tax Lawyer*, published by the American Bar Association (1984-1985)

Washburn University School of Law

– J.D., 1982

Washburn University

– B.B.A., 1979

- Board Certified in Estate Planning and Probate Law, Texas Board of Legal Specialization
- Best Lawyers in Dallas, *D Magazine*, 2001, 2003, 2005, 2007-2009, 2011-2023
- Best Lawyers Hall of Fame, *D Magazine*, 2023
- *The Best Lawyers in America*, (BL Rankings, LLC), 2003-2024
- Texas Super Lawyers, Thomson Reuters, 2003-2007, 2009-2023
- Chambers High Net Worth Ranked, 2019-2022
- Communities Foundation of Texas' Vester Hughes Award

Admissions

- Texas, 1985
- District of Columbia, 1983
- Missouri, 1983
- Kansas, 1982